**FIG. 1**

80

82 General Public	86 Member's Activity Files
84 Advertising Administration	88 Web Reporting

FIG. 2

CONTACT ACTIVITY FILE

Name:	John and Susan Rand
Address:	4 Trap Falls Road
City:	New Canaan
State:	Connecticut
Zip Code:	06840

310

320

MORTGAGE	<<Edit>>		
Principal:	\$250,000.00	Monthly Payment:	\$2,500.00
Interest Rate:	9%	Start Date:	07/13/00
Term:	30	Taxes:	\$3,800
Type:	Fixed	Assessment:	\$250,000
Lender:	World Lending and Savings Bank		

330

CHECKLISTS		SAVINGS TO DATE	
Move to: >	Move from: >	Total:	\$3,532
Phase 2	Phase 5	Interior:	\$2,287
		Exterior:	\$1,245

340

CURRENT REQUESTS		
Vendor	Status	Savings
GE Appliances	Order placed – 09/14/2000	\$150
United Van Lines	Order placed – 08/22/2000	\$3000
Duct Doctors	Info Only – 07/28/2000	TBD
Twin Painting	Quote – 07/28/2000	TBD

A - - - - - A

FIG. 3A

A - - - - - A

350
}

MY REMINDERS	<<Add>>	
Event	Event Date	Reminder Date
My Anniversary	06/25/00	06/15/00
Call travel agent	07/03/00	Not Selected
Timmy's Birthday	08/20/00	08/15/00

360
}

HOME IMPROVEMENTS	<<Add>>		
Project	Vendor	Date	Savings
Kitchen cabinets	The Cabinet Company	09/30/00	\$75
Remodel bathroom	ABC Remodeling	08/26/00	\$1,000
Landscaping	Steve's Landscaping	07/14/00	\$125
Build deck	Decks, Patios & More	07/01/00	\$400

370
}

SETTLEMENT DOCUMENTS		
Document Name	Date	View
HUD	07/11/00	Download:HUD (PDF:256K)
Closing Doc	07/11/00s	Download:PDF (PDF:238K)

FIG. 3B

<u>400</u>		Vendor Info		Policy
		{ 404		{ 406
410		Vendor No.:3SAVON		
Vendor: William Raveis		Office: 860 493-1447		
Market: Avon Placement Type: Fax		Status: Active		
Primary Contact: Ms. Betty Vernee		Title: Agent		
Extension: 860 493-1447		<input checked="" type="checkbox"/> Phone Directory List		
Web site: test.com		<input checked="" type="checkbox"/> Active		
Address: 27 East Main Street		City: Balmville		
State: NY		Zip: 12550		
County: Orange		Email: Bvernee@comp.com		
Phone: 860 493-1447		Fax: 860 677-6356		

A - - - - - A

FIG. 4A

A - - - - - A

420 }

Contacts				
Name	Title	Phone	Fax	Email
Ms. Beck Ashworth		Office Manager	203 524-3856	203 524-3866
Ms. June Holland		Admin Manager		
Mr. Anthony Tomlinson		Agent		
Ms. Marsha Boschen		Agent		

FIG. 4B

500

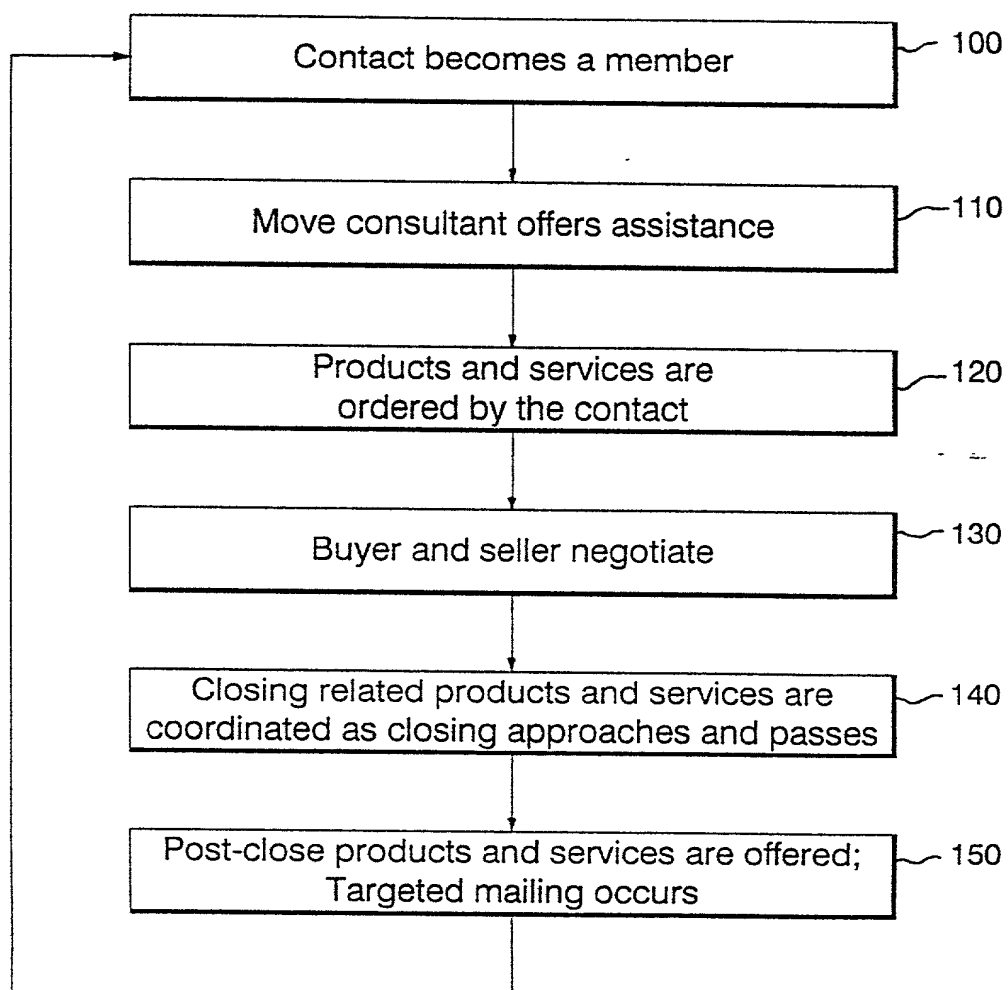
Service Available	Services Assigned
Alarm needs	Alarms
Cable	Cable TV
Card activation	Electric
Gas	Home Listing
Home findings	Insurance needs
Home inspection	Legal needs
Home mortgage	Oil
Home warranty	Painting services
Inspection	Phone services
Insurance	Phone service
Internet	Propane
Newspaper	Rental needs
	Security
	Self move
	Storage
	Storage needs
	Truck rental
	Van lines
	Vans
	Web service
	Wireless

FIG. 5

610 ?	
Service: Home Findings	
Survey ID: 9843752	Agent: Ms. Barbara Pund
Move Consultant: Mary	Vendor: William Raveis
Extension: 104	Vendor ID: CMSAT-ug
	Contact: Bart Claiborn
620 ?	
MOVE CONSULTANT	
Promptness in returning calls:	Knowledge:
Explanation of Program:	Courtesy:
Overall Performance:	
630 ?	
VENDOR	
Promptness in returning calls:	Knowledge:
Explanation of Program:	Courtesy:
Overall Performance:	
640 ?	
Is there more we could have done for you?	

600

FIG. 6

**FIG. 7**

10/14

TRANSACTION TRACKING

Name: Aiden Quinn
Address: 100 Riddle Lane
City, State, Zip: Shelton, CT 06840
Purchase Price: \$256,000
Est. Closing Date: 01-31-2001

810

ACME REAL ESTATE COMPANY

888-257-3278

Contact your move consultant.

Select this area to
link to information
relating to your sales
agent.

820

831

830

Stage	Estimated	Actual	Completed By	Notes
1. Binder/Contract	01-09-2001	01-10-2001	move consultant	<input type="checkbox"/>
2. Mortgage				<input type="checkbox"/>
3. Appraisal				<input type="checkbox"/>
4. Inspection				<input type="checkbox"/>
5. Contingencies & Contract				<input type="checkbox"/>
6. Movers				<input type="checkbox"/>
7. Legal Closing/Title				<input type="checkbox"/>
8. Utilities				<input type="checkbox"/>
9. Insurance				<input type="checkbox"/>

832

800

Figure 8

<p>ACME REAL ESTATE COMPANY</p> <p>888-257-3278</p> <p><u>Contact your move consultant.</u></p>	<p>Select this area to link to information relating to your sales agent.</p>
---	--

920

910

MORTGAGE
<p>Your search for mortgage resulted in on service partner.</p> <p>AMERICAN INDIAN MORTGAGE COMPANY: American Indian Mortgage Company has been providing individuals with innovative mortgage services since 1986. We are the best! Please call our 24-hour hotline for pre-approval to remove any anxieties you may have about qualifying for a mortgage.</p> <p>Toll Free - 888-235-3758 Email: AmericanIndMort@srv.com Fax - 888-354-3453</p> <p><<return to home page>></p>

900

Figure 9

Available Services	
Air Conditioning	
Air Duct Cleaning	
Animal Kennels	
Appliances	
Artwork	
Attorney	
Bottled Water	
Cabinets	
Carpet Cleaning	
Closet Organizer	

~1050

SCRIPT
Thinking of Moving

~1030

Tasks for Contact	
Task Date	Description
01-10-2001	Introduction to Contact
02-21-2001	Follow up on package sent
02-22-2001	Offer mortgage pre-approval services

~1040

Stage	Estimated	Actual	Completed By	Notes
1. Binder/Contract	01-09-01	01-10-01	agent	☐
2. Mortgage				☐
3. Appraisal				☐
4. Inspection				☐
5. Contingencies & Contract				☐
6. Movers				☐
7. Legal Closing/Title				☐
8. Utilities				☐
9. Insurance				☐

~1010

Name:	Aiden Quinn	Licensee:	ACME Real Estate
Address:	100 Riddle Lane	Office:	Shelton, CT
City, State, Zip:	Shelton, CT 06840	Agent:	Sally Andrews
Phone:	203-293-4876	Customer Type:	Buying
Email:	quinne@aol.com	Move Consultant:	Joanne Rossi
Living Status:	own	Source:	Agent
Contact method:	email		
Property type:	Move to		
Spouse:	Jeanne		

~1020

Figure 10

ACME REAL ESTATE COMPANY	
888-257-3278	Select this area to link to information relating to your sales agent.
<u>Contact your move consultant.</u>	

1120

TRANSACTION NOTES	
Name:	Aiden Quinn
Address:	100 Riddle Lane
City, State, Zip:	Shelton, CT 06840
Purchase Price:	\$256,000
Est. Closing Date:	01-31-2001

1110

NOTES
Current Notes for Mortgage:
01/10/2001 Follow up on pre-approval application
Add New Notes
Call move consultant to verify w2 information.

1130

1132

1134

Figure 11

Date	Description	Created By
01-12-2001	Contact mortgage broker	J. Rossi

1210

1220

Notes
Collect w2 information from contact and provide same to mortgage broker.

1200

Figure 12